OFFICE OF FINANCIAL MANAGEMENT

BUDGET AND ALLOTMENT SUPPORT SYSTEMS (BASS)

PERFORMANCE MEASURE TRACKING (PMT)
COMPLETE SYSTEM MANUAL

Version 1.2 – Final Draft December 1, 2005

This document has not been through a thorough edit. Please contact the BASS Help Line at 360 725-5278 if you see any problems with this system manual.

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(1) BASS Background

The Budget and Allotment Support System (BASS) is a long-term project geared toward bringing all the components of Washington State's budget and allotments systems under one web-based umbrella. This project is lead by the Office of Financial Management (OFM) with the assistance of Customer User Groups with diverse agency representation. The systems being replaced are older mainframe systems with little flexibility and complicated screens. At the same time we are adding tools based on user needs and changes in the state budgeting process.

(2) PMT Background

PMT is a replacement for the previous Performance Measure Tracking and Estimating System (PTMES) that was first released in 1997. The PMT replacement using system lessons learned to provide a system to users that streamlines data entry from PMTES as well as accommodates the change in business climate to align performance measures to agency activities for reporting to OFM rather than agency goals. However, agencies are still encouraged to show performance measure links to agency goals in the strategic planning process.

(3) PMT Goals

PMT is designed to support those performance measure activities that are common to most state government agencies. The support of these core features common to all state agencies was one of the primary objectives of the project. These include:

Entry of performance measure information – Agencies can propose or edit performance measures to establish a list of performance measures that best support the current Activity Inventory.

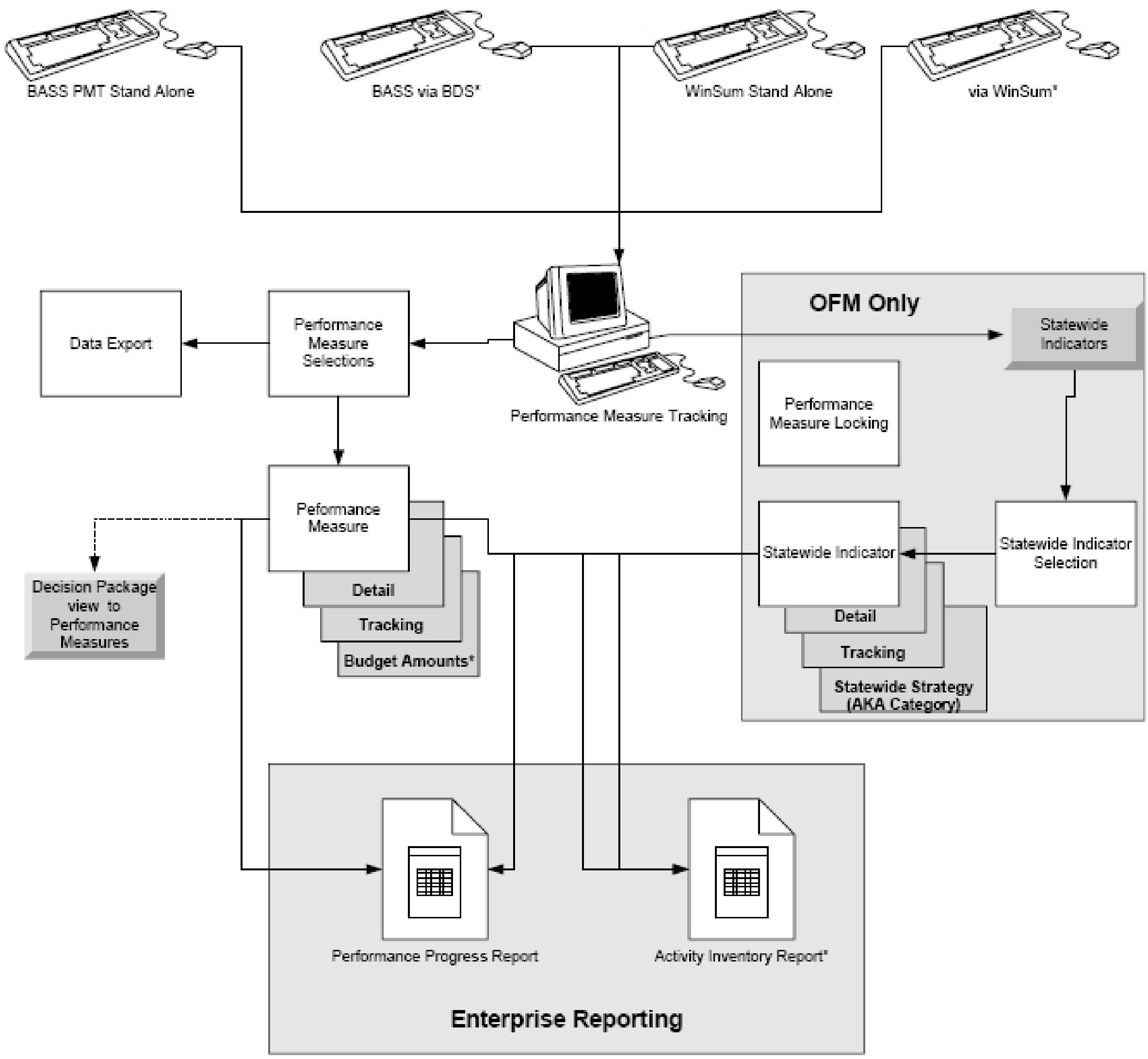
Creating Preliminary Budget Proposals – PMT, in conjunction with BDS, provides the ability to link performance measures to specific decision packages. Further, the system allows users to provide information on the targeted performance measure results given the proposed budget.

Estimating and tracking performance measure progress – PMT provides functionality for users to enter tracking estimates as determined based on funded levels once the budget has passed. Agencies can enter estimates for quarters, annual, biennial, or any combination as appropriate. Agencies are expected to record actual performance measure amounts once the time period has passed.

OFM Review, Approval, Publish – The system allows OFM to review submitted performance measures, compare detail to previously approved measures, and approve or unapproved as determined. This provides OFM the ability to publish performance measures on behalf of the state.

(4) PMT System Outline

The following diagram outlines the primary functions available in the PMT and their relationship to other supporting systems.



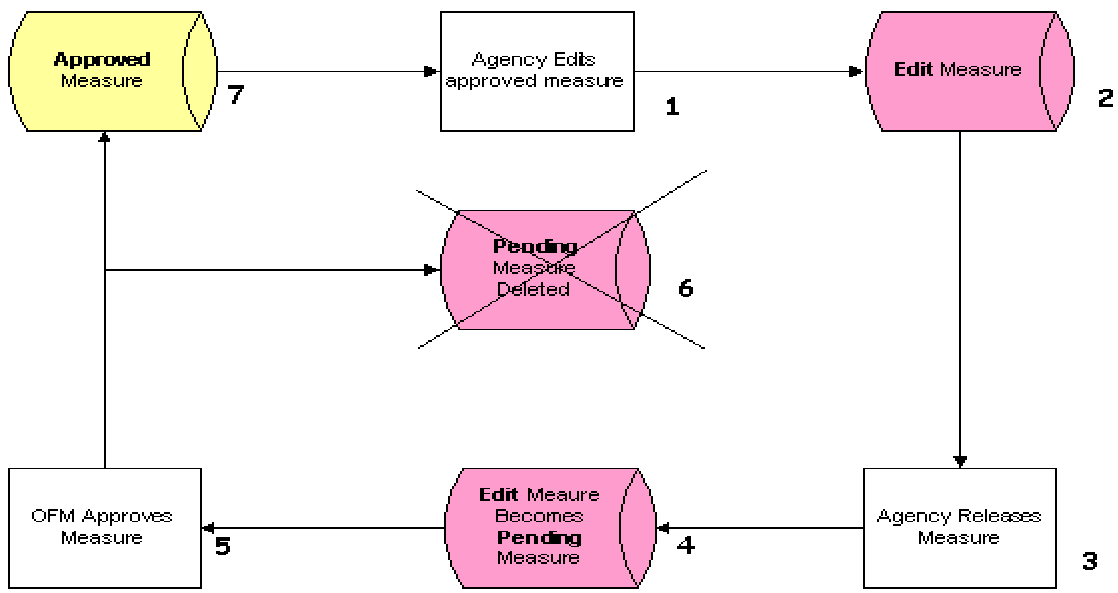
(5) PMT Security

Function	PMT Access	BDS Access	OFM Budget Ops	OFM Analyst
Performance Measure Selections	View/Edit	View	View/Edit	View
Performance Measure Detail (Edit/Unapproved statuses)	View/Edit	View	No access	No access
Performance Measure Detail (Other statuses)	View/Edit	View	View/Edit	View
Performance Measure Tracking (Edit status)	View/Edit	View	No access	No access
Performance Measure Tracking (Other statuses)	View/Edit	View	View/Edit	View
Performance Measure Budget Amounts (Edit/Unapproved statuses)	View/Edit	View/Edit	No access	No access
Performance Measure Budget Amounts (Other statuses)	View/Edit	View/Edit	View/Edit	View/Edit
Decision Package Linkage	No access	View/Edit	No access	No access
SW Indicator Selection	No access	No access	View/Edit	View
SW Indicator Detail	No access	No access	View/Edit	View
SW Indicator Strategies	No access	No access	View/Edit	View
SW Indicator Tracking	No access	No access	View/Edit	View
Performance Progress Report (Edit/Unapproved statuses)	View	View	No access	No access
Performance Progress Report (Other statuses)	View	View	View	View
Activity Inventory Report (Edit/Unapproved statuses, unreleased version)	No access	View	No access	No access
Activity Inventory Report (Other statuses, released version)	No access	View	View	View

(6) PMT Statuses

- **Approved**– Submitted by the agency and approved by the budget analyst. Once a measure is approved it can never be deleted. OFM may set as OFM Inactive (see below).
- **Unapproved** – Submitted by the agency and not approved by the budget analyst. Further action required by the agency, either edit or delete. Measures in unapproved status are not visible to OFM staff.
- **Pending** – Submitted by the agency, no action yet by the budget analyst. Awaiting approval or unapproved from OFM.
- **OFM Inactive** – Was previously an approved measure. Tracking is no longer required by the agency or reported by OFM.
- **Edit** – Agency is in the process of editing an existing measure or is a new measure. Measures in edit status are not visible to OFM staff.

An example of status changes



1. Agency makes a change to an **Approved** measure.
2. A copy of the **Approved** measure is made and saved as an **Edit** copy. There are now two instances of the performance measure, **Approved** and **Edit**.
3. The agency releases the **Edit** measure to OFM.
4. The **Edit** measure is updated with a status of **Pending**. There are still two copies of the measure, **Approved** and **Pending**.
5. OFM approves the **Pending** measure.
6. The **Pending** measure becomes **Approved**.
7. There is now only one copy of the performance measure, **Approved**.

I. System Access

There are four methods for accessing PMT. Access of the Statewide Indicators piece for OFM is described separately in the **Statewide Indicators** section of the system manual.

1. PMT Stand alone BASS for agency users

   Access – From the **BASS Main Menu**, select the Graph Icon labeled Performance Measure Tracking (PMT) System.

2. PMT via BDS in BASS

   Access – Two options for access:
   1. From the BDS Main Menu, select **Other Budget Management Options / Agency Activity Descriptions**.
   2. From any screen other than BDS Main Menu, select **Tools / Agency Activity Description**.

   From the Activity Selection screen, select **Performance Measure Selection**. Alternatively, you may open a performance measure from within any activity.

3. PMT Stand alone WinSum for OFM users

Access – Open WinSum and select **File / Open / Performance Measures** from the WinSum menu bar. Select an agency to view and click **OK**.

4. PMT via WinSum for OFM users

   Access – From the **Agency Budget** view in WinSum. Select to view Activity Descriptions by selecting the appropriate icon from the tool bar. Select **View / Performance Measures** from the Activity Selections menu bar.

II. PMT Menu Bar

The following items are "standard" on the PMT Menu Bar. Changes may occur from screen to screen. These changes are noted on the appropriate screens with expansion.

Note: If viewing this document on-line, users should be able to click a bolded screen reference to jump to that screen description. The cursor will change to a pointed finger when this option is available.

Menu Option	What it does
File	
Save Changes	Saves pending changes
Cancel Changes	Clears pending changes and returns to last saved state
Exit Performance Measures	Closes the Performance Measures window. Will return to BASS main menu if opened as BASS stand-alone
Edit	
Edit Performance Measure	Opens to the **Performance Measure Detail** where users with access can make changes.
Delete Performance Measure	Deletes the selected performance measure
Add Performance Measure	Creates a new, blank performance measure and opens to the **Performance Measure Detail** screen for the detail to be added.
View	
Set Performance Measure Filter	Brings up the performance measure filter to allow the user to limit the performance measures viewed
Performance Measure Selection	Returns the user to the **Performance Measure Selection** screen when selected
Tools	
Data Export	Initiates the **Data Export.**
Reports	
Launch Enterprise Reporting	Opens a new Window at the Enterprise Reporting login screen
Help	
BASS Library	Help files and information for the systems available within BASS
PMT Help	PMT specific help files

III. Performance Measures

A. Performance Measure Selection

The Performance Measure Selection screen is the initial screen when opening PMT. This screen presents all performance measures for the agency but contains the option to filter the data based on status and/or program.

1. Performance Measure Selection

The Performance Measure Selection screen lists all performance measure for the selected agency. There is the ability to filter the performance measures to view based on status and/or program. Users with appropriate security may add, edit, or delete performance measures from this screen (see **PMT Security**).

Access – The Performance Measure Selections screen is the default screen presented to users when accessing PMT. There is also a **View / Performance Measure Selection** option available from the menu bar once the user has navigated to a different screen of the system.

PMT Menu Bar - The Menu Bar for this tab set does not have any additional features.

Screen Notes –

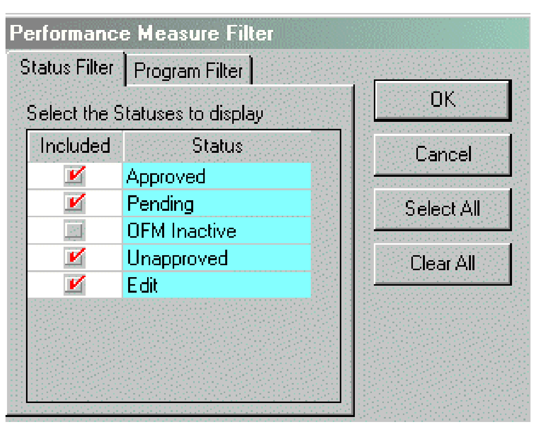
- You may double click to open a specific measure
- You can "filter" the performance measures viewed in the selection screen
- You may right-click on a performance measure to get a context menu to select to Edit or Delete a performance measure.

Filter

Concept – The Performance Measure Filter allows users to select the measures to include in the view of the Performance Measure Selections based on status and/or program.

Access – The Performance Measure Filter is available by selecting **View / Performance Measure** filter from the PMT Menu Bar.

Status Filter- Statuses available in the filter are limited to statuses available to the user (e.g., Edit and Unapproved will not be available to OFM users).



Included – Checked boxes indicate status to be included in the view when the filter is applied. By default the status will be Approved, Pending, Unapproved, and Edit. PMT will only display one copy of a measure at a time. So in the case where both an Edit and Approved copy exists, the Edit copy will be displayed. To view only approved copies of a measure, select to only include Approved in the filter.

Status – A list of status available for filtering. Please see **PMT Statuses** for more information on statuses.

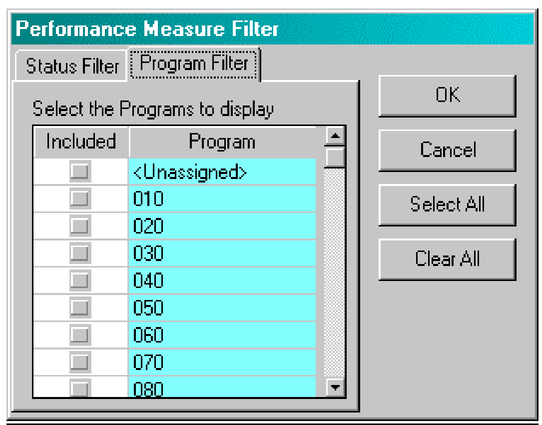
OK – Returns the user to the previous screen with the selected filter applied.

Cancel – Closes the Filter screen without changing the filter selections from the previous view.

Select All – A quick option to check all available boxes.

Clear All – A quick option to clear checks from all available boxes.

Program Filter



Included – Checked boxes indicate programs to be included in the view when the filter is applied. By default all programs including unassigned are assumed prior to entering this screen. Once this screen is opened the user will be required to select at least one program prior to selecting OK otherwise the system does not know what program(s) to include.

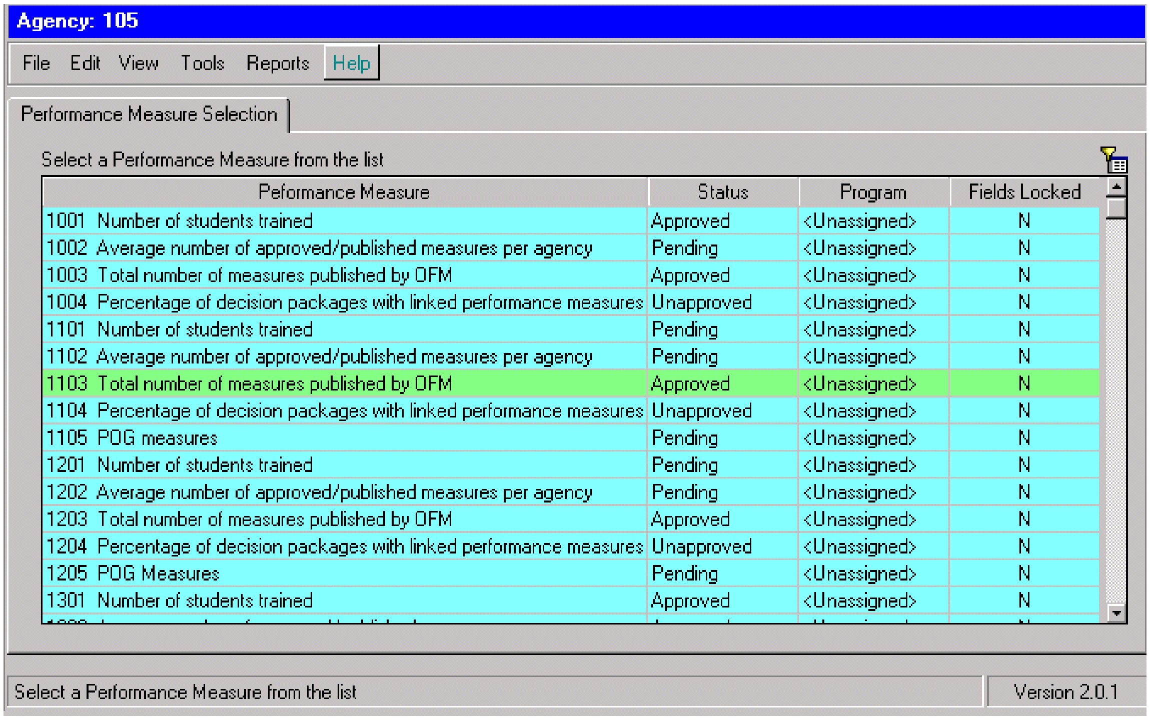
Program – A list of agency programs based on the programs available in AFRS for the most recent budget period.

OK – Returns the user to the previous screen with the selected filter applied.

Cancel – Closes the Filter screen without changing the filter selections from the previous view.

Select All – A quick option to check all available boxes.

Clear All – A quick option to clear checks from all available boxes.



Peformance Measure	Status	Program	Fields Locked
1001 Number of students trained	Approved	<Unassigned>	N
1002 Average number of approved/published measures per agency	Pending	<Unassigned>	N
1003 Total number of measures published by OFM	Approved	<Unassigned>	N
1004 Percentage of decision packages with linked performance measures	Unapproved	<Unassigned>	N
1101 Number of students trained	Pending	<Unassigned>	N
1102 Average number of approved/published measures per agency	Pending	<Unassigned>	N
1103 Total number of measures published by OFM	Approved	<Unassigned>	N
1104 Percentage of decision packages with linked performance measures	Unapproved	<Unassigned>	N
1105 POG measures	Pending	<Unassigned>	N
1201 Number of students trained	Pending	<Unassigned>	N
1202 Average number of approved/published measures per agency	Pending	<Unassigned>	N
1203 Total number of measures published by OFM	Approved	<Unassigned>	N
1204 Percentage of decision packages with linked performance measures	Unapproved	<Unassigned>	N
1205 POG Measures	Pending	<Unassigned>	N
1301 Number of students trained	Approved	<Unassigned>	N

<u>Performance Measure</u>- Displays the code and title of each performance measure available.

<u>Status</u> – Displays the status of the performance measure. See **PMT Statuses** for more information on statuses.

<u>Program</u> – Displays the program assigned to the performance measure of "unassigned" if no program was selected.

<u>Fields Locked</u> – Displays "N" if no fields are locked by OFM or "Y" if there are fields locked.

B. Performance Measure Detail

<u>Concept</u> – Performance Measures include basic descriptive information, measure target and actual amounts, as well as proposed budget amounts. This set of screen provides access to these elements of the Statewide Indicator.

<u>Access</u> – Performance Measure Detail can be accessed by double clicking on a measure in the **Performance Measure Selection** screen, or by clicking once to highlight the measure, then selecting **Edit / Edit Performance Measure** also from the **Performance Measure Selection** screen.

<u>PMT Menu Bar</u> – The menu bar will contain different options under **Edit / Status** depending on if the user is an agency user or OFM user. Please see **PMT Statuses** for more information on the statuses.

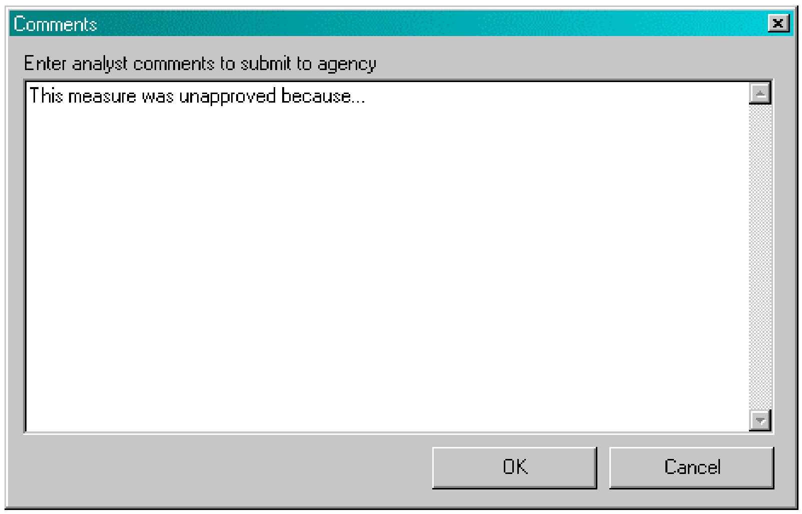
<u>Agency User</u>

- Edit – Creates a copy of the measure in Edit status. This can also be accomplished by making any change to an Approved or Pending Measure. When editing an OFM Inactive or Unapproved measure it will simply update the status, not create a new copy.

<u>OFM User</u>

- Approved – Available for measures that are in Pending status. This will change the status of the measure to Approved, overwriting any previous Approved copies of this performance measure.
- Unapproved – Available for measure that are in Pending status. This will change the status of the Pending measure to Unapproved. Any existing Approved copies of the measure will be remain unchanged.
- OFM Inactive – Available for measures that are in Approved status. This will change the status of the measure to OFM Inactive.

Changes to Performance Measure status are not saved until the user selects **File / Save Changes**. In the event that a performance measure is changed to **Unapproved** by an OFM user, they will be presented with a **Comments** box to record the reason for the unapproval.



Comments – A place for the OFM user to record comments on the reason for unapproval.

OK – Saves the measure as unapproved. All agency users for that agency with Release access will receive e-mail notification of the unapproval that includes the comments provided by the OFM user.

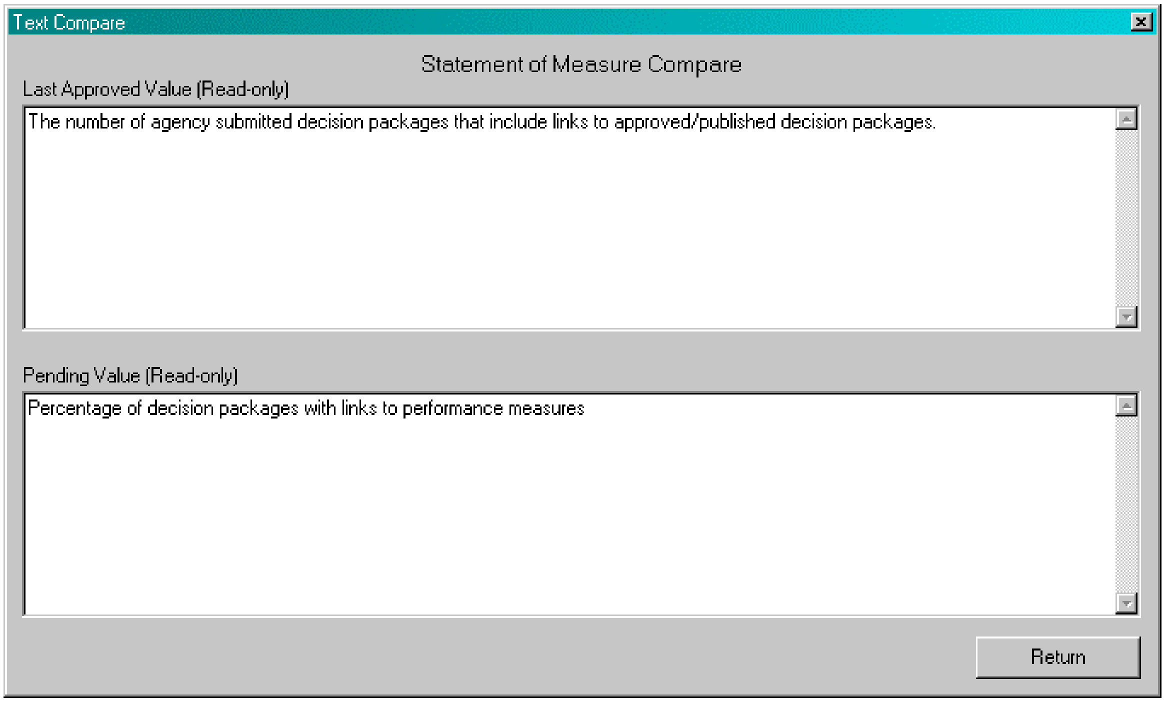
Cancel – First provides a message box to the user with further instruction. Once **OK** is selected on the message box, returns to the previous screen without saving changes.

1. Performance Measure Detail

Concept – The Performance Measure Detail tab contains the basic information about the performance measure.

Screen Notes

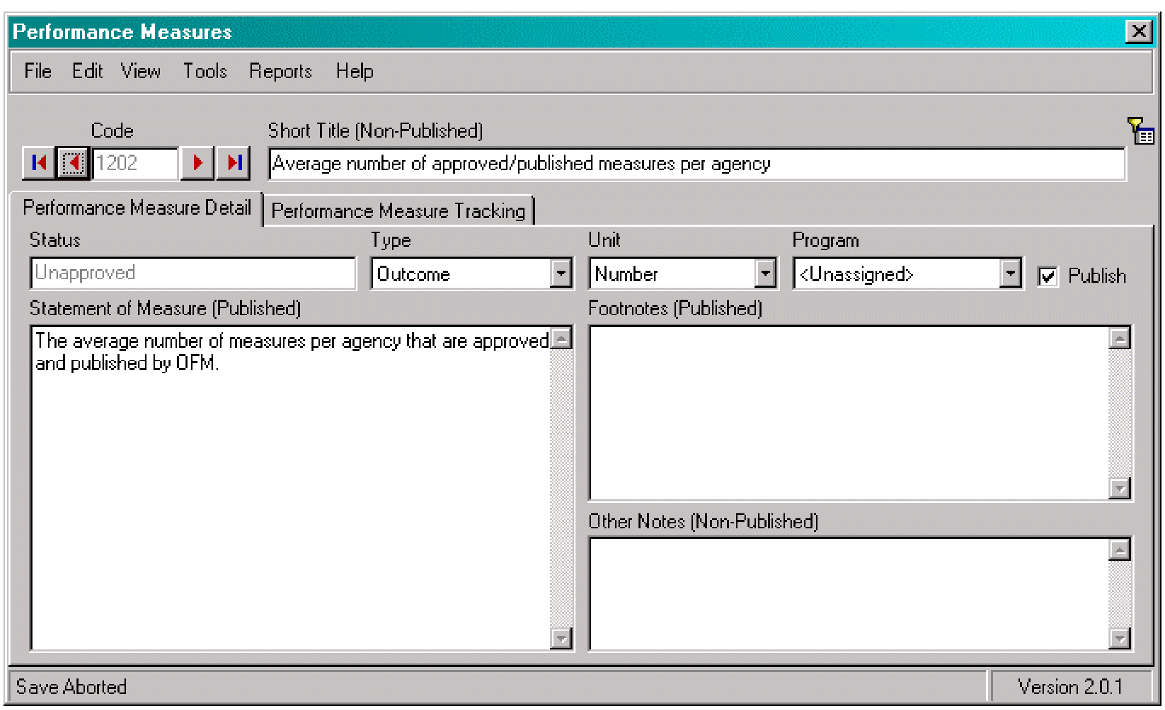
- When the user is an OFM user and they are viewing a Pending measure, a splat ( )will display next to each field that is different from the Approved measure to allow for easy review of performance measure changes. The OFM user clicks the splat icon to bring up the following review screen.



Last Approved Value (Read-only) – Displays the text of the field as it exists in Approved status. If blank, indicates no previous data available usually indicating a new performance measure. Edits are not allowed in this field.

Pending Value (Read-only) - Displays the text of the field as it exists in Pending status indicating the agency's desired change. Edits are not allowed in this field.

Return – Returns the user to the previous screen.



Code – Displays the performance measure code of the measure being reviewed. The code is not editable for existing performance measures. The code will be blank if adding a new measure for the user to enter the desired code. Codes may only be used one per agency and are 4-characters long.

Navigation buttons (|<, <, >, >|) – These buttons maybe used to navigate through the performance measures available as defined by the **Filter**.

|< - First record
< - Previous record
> - Next record
>| - Last record

Short Title (Non-Published) – A short title for the performance measure. This title is used to display the measure in the **Performance Measure Selection** screen. It is not published in reports or on the Internet. This title may be 100 characters long.

Status – Displays the status of the performance measure. This field is not editable. It will change based an action that changes the status such as editing, approving, or unapproving. Please see **PMT Statuses** for more information on status.

Type – This combo box provides options for the type of performance measure. Options include Output, Outcome, and Efficiency.

Unit – This combo box provides options for the unit of measure for the performance measure. Units include number, dollar, percent, and ratio. The unit will drive how information is displayed on reports.

Program – This combo box provides a list of programs as defined in AFRS for the most current budget period plus an option for Unassigned. Use of this field is optional for agencies that wish to segregate performance measure by program. Any measure that supports more than one program should be left "unassigned". Unassigned is the default program selection.

Publish – This checkbox is only visible to OFM users and editable by OFM Budget Operations users. All performance measures get marked as Publish by default. OFM Budget Operations may uncheck this box to indicate they do not want the measure to be included in reports published to the Internet.

Statement of Measure (Published) – This field is used to record the full statement of measure to be included on reports. The statement of measure may be up to 255 characters long.

Footnotes (Published) – This field is used to record any footnotes to include with the performance measure on reports. The footnotes speak to the measure in general. The footnote may be up to 500 characters long.

Other Notes (Non-Published) – This field is used to record any additional information about the performance that should not be included on reports. The field is visible to OFM and agency staff, but will not be available on any reports. Other notes may be up to 500 characters long.

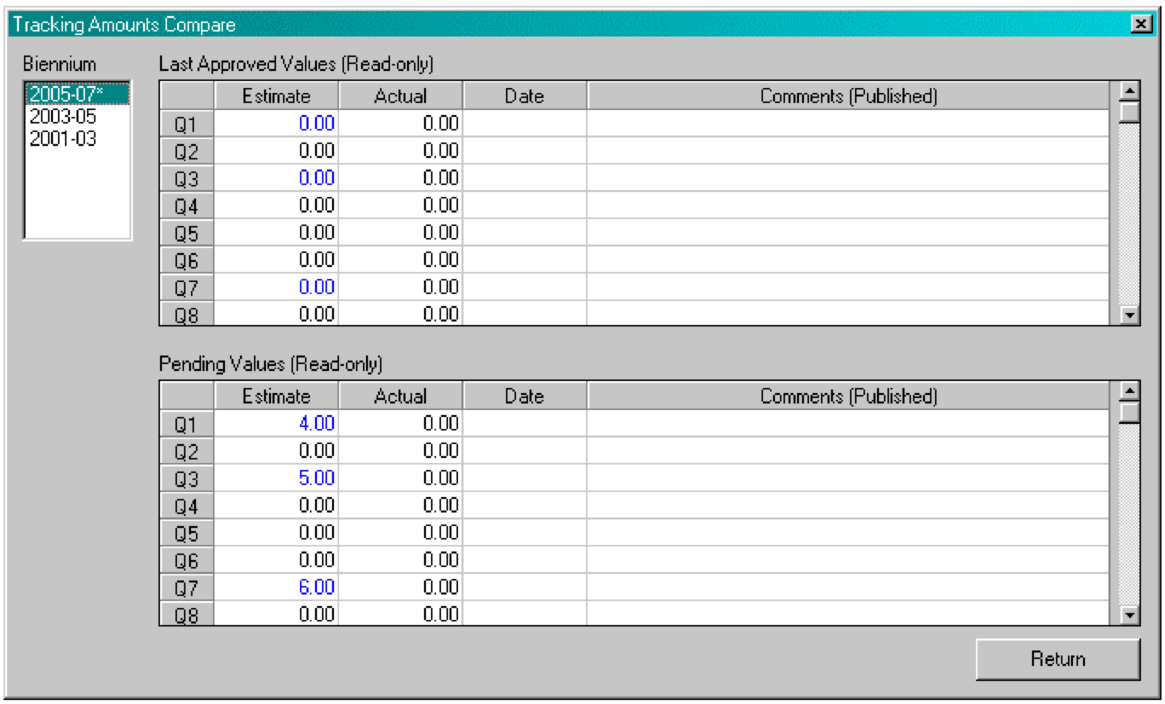
2. Performance Measure Tracking

Concept – The Performance Measure tracking screen is used to record all estimate and actual performance measure amounts. The screen provides the ability to enter historical information for more meaningful reporting.

Screen Notes

- A new option called **Add Prior Biennium** is available under **Edit** for this screen only. The option will add the biennium prior to the last biennium listed. There is no limit on the number of biennia added. This option is used to capture historical information for inclusion in reports.

- When the user is an OFM user and they are viewing a Pending measure, a splat ()will display next to each field that is different from the Approved measure to allow for easy review of performance measure changes. The OFM user clicks the splat icon to bring up the following review screen.



Last Approved Values (Read-only)

	Estimate	Actual	Date	Comments (Published)
Q1	0.00	0.00		
Q2	0.00	0.00		
Q3	0.00	0.00		
Q4	0.00	0.00		
Q5	0.00	0.00		
Q6	0.00	0.00		
Q7	0.00	0.00		
Q8	0.00	0.00		

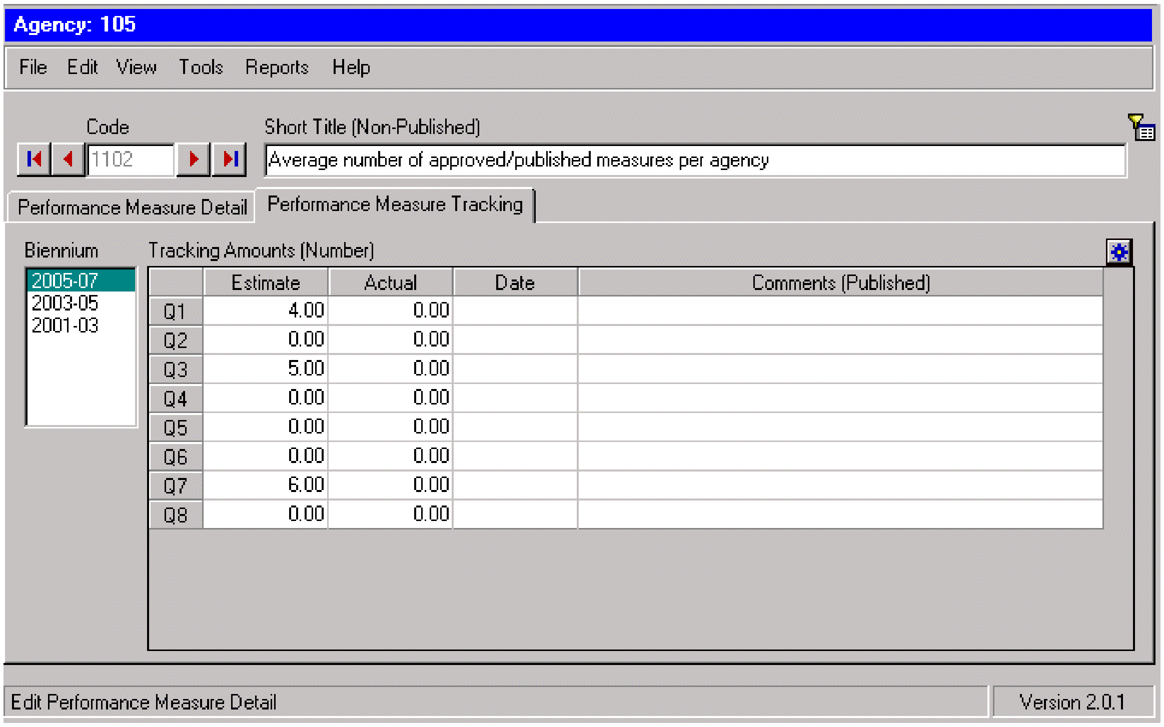
Pending Values (Read-only)

	Estimate	Actual	Date	Comments (Published)
Q1	4.00	0.00		
Q2	0.00	0.00		
Q3	5.00	0.00		
Q4	0.00	0.00		
Q5	0.00	0.00		
Q6	0.00	0.00		
Q7	6.00	0.00		
Q8	0.00	0.00		

Biennium – Biennia associated with the performance measure. Biennia with an * asterisks have changes from the last approved value to display. Select the biennium to see the changes.

Last Approved Values (Read-only) – Displays the tracking information as last approved. See below for Biennium and Tracking Amounts worksheet for more information.

Pending Values (Read-only) – Displays the tracking information submitted by the agency and awaiting approval. See below for Biennium and Tracking Amounts worksheet for more information.



Code – Displays the performance measure code of the measure being reviewed. The code is not editable for existing performance measures. The code will be blank if adding a new measure for the user to enter the desired code. Codes may only be used once per agency and are 4-characters long.

> Navigation buttons (|<, <, >, >|) – These buttons maybe used to navigate through the performance measures available as defined by the **Filter**.
>
> |< - First record
> < - Previous record
> > - Next record
> >| - Last record

Short Title (Non-Published) – A short title for the performance measure. This title is used to display the measure in the **Performance Measure Selection** screen. It is not published in reports or on the Internet. This title may be 100 characters long.

Biennium – The list box displays all biennia available. The ensuing biennium will be added as part of the BASS Biennial Roll process that happens about December of odd numbered years. Agencies may add prior biennia by selecting **Edit / Add Prior Biennium** from the PMT menu bar. Data entered into prior biennia will be included in the data trend line on all reports.

* An asterisks next to a biennium indicates that there are unsaved changes to tracking in that biennium if the user is an agency user or unapproved changes if the user is an OFM analyst.

Tracking Amounts - Heading for the tracking worksheet in PMT. The unit of the measure is displayed in parenthesis next to the "Tracking Amounts" label.

> Q1 – Q8 – Indicates the quarters in the biennium. Estimates or actuals should be recorded in the appropriate quarter for the measure. Quarters with no estimates, actual, date measured, or comments are hidden from reports.
>
> Estimate – This is used to record the estimated level of the performance measure within the appropriate quarters. The field format allows for a number up to 9,999,999.99 to best

accommodate reporting. Agencies are encouraged to use rounding and note rounding in the footnote when the estimate is greater than this.

Actual – This is used to record the actual level of the performance measure once the appropriate time period has passed. The field format allows for a number up to 9,999,999.99 to best accommodate reporting. Agencies are encouraged to use rounding and note rounding in the footnote when the estimate is greater than this.

Date – Reserved for date measured. This field is not required. It is recommended you complete the date measured when the actual date measured is not in alignment with the period entering for (e.g., date measured was 2-weeks after the end of the quarter). This date will be displayed on reports when associated with the last quarter with actual amounts.

Comments – Comments regarding the current quarter measure. This field is not required. It is recommended to record anomalies in data. The comment will be displayed on reports when associated with the last quarter with actual amounts.

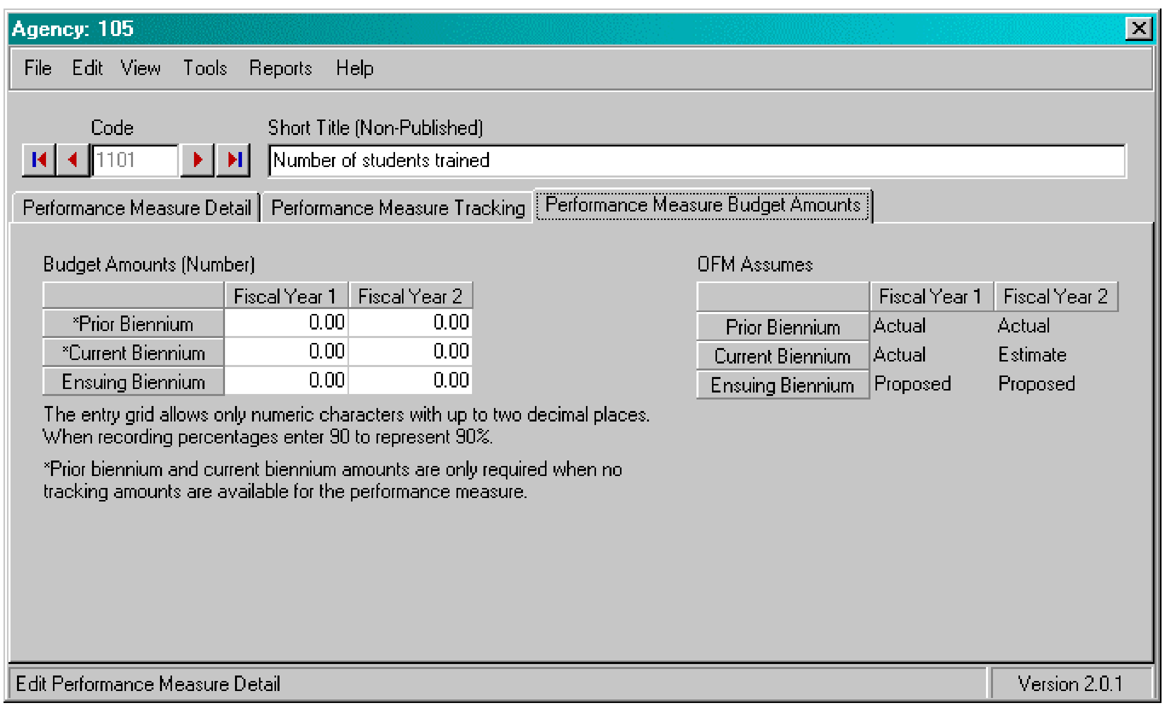
3. Performance Measure Budget Amounts

Concept – This screen is used to enter and report proposed levels given a particular budget version.

Access – This screen is only available when accessing performance measure via a budget in either WinSum or BDS (see **System Access** for more information). If not coming through BDS or WinSum, the required tab will be missing.

Performance Measure Tracking can be accessed by double clicking on a measure in the **Performance Measure Selection** screen, or by clicking once to highlight the measure, then selecting **Edit / Edit Performance Measure** also from the **Performance Measure Selection** screen. Select the **Performance Measure Tracking** tab

Screen Notes - None



Code – Displays the performance measure code of the measure being reviewed. The code is not editable for existing performance measures. The code will be blank if adding a new measure for the user to enter the desired code. Codes may only be used one per agency and are 4-characters long.

Navigation buttons (|<, <, >, >|) – These buttons maybe used to navigate through the performance measures available as defined by the **Filter**.

|< - First record
< - Previous record
> - Next record
>| - Last record

Short Title (Non-Published) – A short title for the performance measure. This title is used to display the measure in the **Performance Measure Selection** screen. It is not published in reports or on the Internet. This title may be 100 characters long.

Budget Amounts - Heading for the budget worksheet in PMT. The unit of the measure is displayed in parenthesis next to the "Budget Amounts" label.

Fiscal Year 1 – First fiscal year of the indicated budget period.

Fiscal Year 2 – Second fiscal year of the indicated budget period.

Prior Biennium – Used to record the amount of the measure in the prior biennium. If this measure is currently tracked, amounts are not required here as reports will utilize the tracking amounts. The field format allows for a number up to 9,999,999.99 to best accommodate reporting.

Current Biennium – Used to record the amount of the measure in the current biennium. If this measure is currently being tracked, amounts are not required here as reports will utilize the tracking amounts. The field format allows for a number up to 9,999,999.99 to best accommodate reporting.

Ensuing Biennium – The amounts proposed for the ensuing biennium given funding requests in the current budget version. The field format allows for a number up to 9,999,999.99 to best accommodate reporting.

C. BDS Decision Package View

Concept – BDS allows users to show linkages between performance measure in PMT and the decision packages in BDS. This happens by displaying PMT data within the decision package console of BDS.

This relationship is explored in detail in the BDS System Manual found under BDS in the BASS Library.

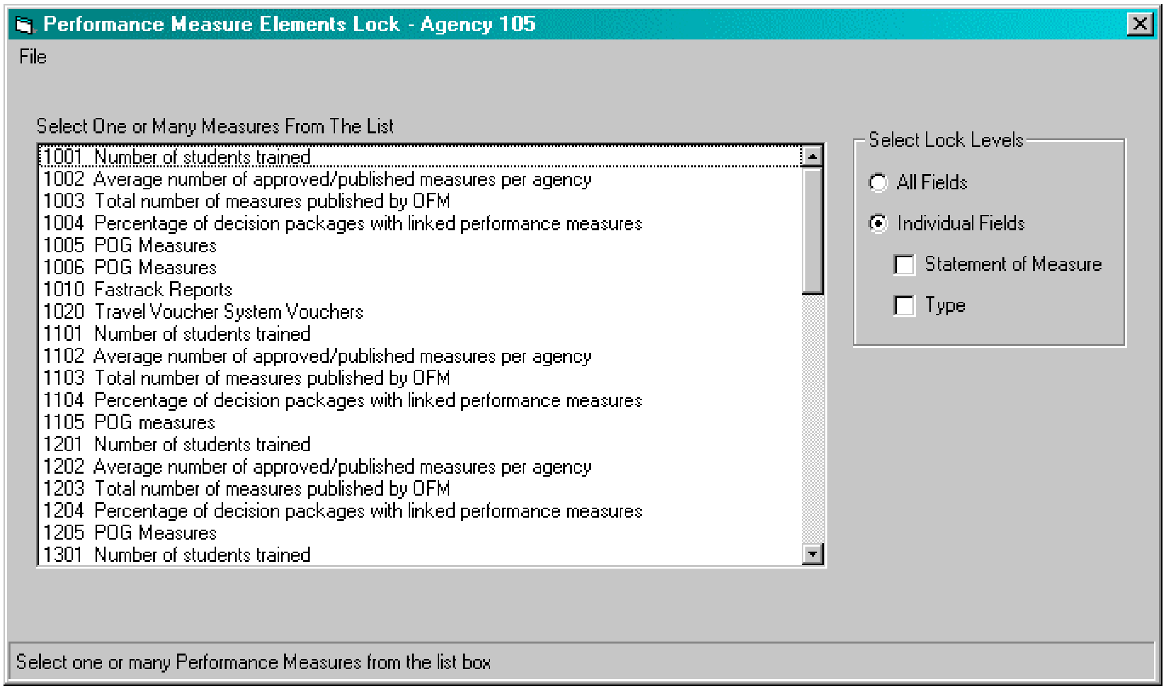
D. Performance Measure Locking

Concept – This screen of PMT allows OFM Budget Operations to lock the Statement of Measure or Type of a performance measure.

1. Performance Measure Locking

Access – This function can only be accessed via Winsum by selecting **File / Operations / Performance Measure Elements Lock** then by selecting the agency from the list presented and click **OK**.

Screen Notes – The only menu bar option available from this screen is the **File** menu option. Under that option users may select to **Save Changes**, **Cancel Changes**, or **Exit**.



Select One or Many Measure From The List – Allows the users to select one or more measure from the list for changing the lock status. User may hold down Ctrl button to select different measures from within the list or Shift to select a sequential group.

Select Lock Fields – This group sets the locks as indicated when the screen is saved.

> All Fields – When this option is selected, both the type and the statement of measure will indicate locked and the corresponding checkboxes will become disabled.
>
> Individual Fields – When this option is selected both the statement of measure and type lock checkboxes are available for the user to select only one of the options.
>
> Statement of Measure – When this checkbox is selected and saved, agency users may not edit the statement of measure. This option is selected and grayed out when the user selects **All Fields** mentioned above.
>
> Type – When this checkbox is selected and saved, agency users may not edit the type for the measure. This option is selected and grayed out when the user selects **All Fields** mentioned above.

IV. Statewide Indicators

Concept – Statewide Indicators are performance measures that have impacts or cross agencies. These are high-level performance measures that OFM publishes and tracks to support the state budget. Indicators may relate to one ore many Statewide Result Areas as well as one or more Statewide Categories. Statewide Indicators themselves do not have different versions, but must relate to budget version when viewed or reported on to ensure direct ties to Statewide Result Areas and Categories that are current and relevant. This function of PMT is only available to OFM Operations Users.

Access – From the WinSum Menu Bar select **File / Open / Statewide Indicators**, select the appropriate **Version,** and click **OK.**

PMT Menu Bar – The Menu Bar is similar to the Menu Bar described above at **PMT Menu Bar** with the exception of terminology changes to reflect **Indicators** instead of **Performance Measures**.

A. Statewide Indicator Selection

Concept – The Statewide Indicator Selection screen contains a list of Statewide Indicators available by Statewide Result Area.

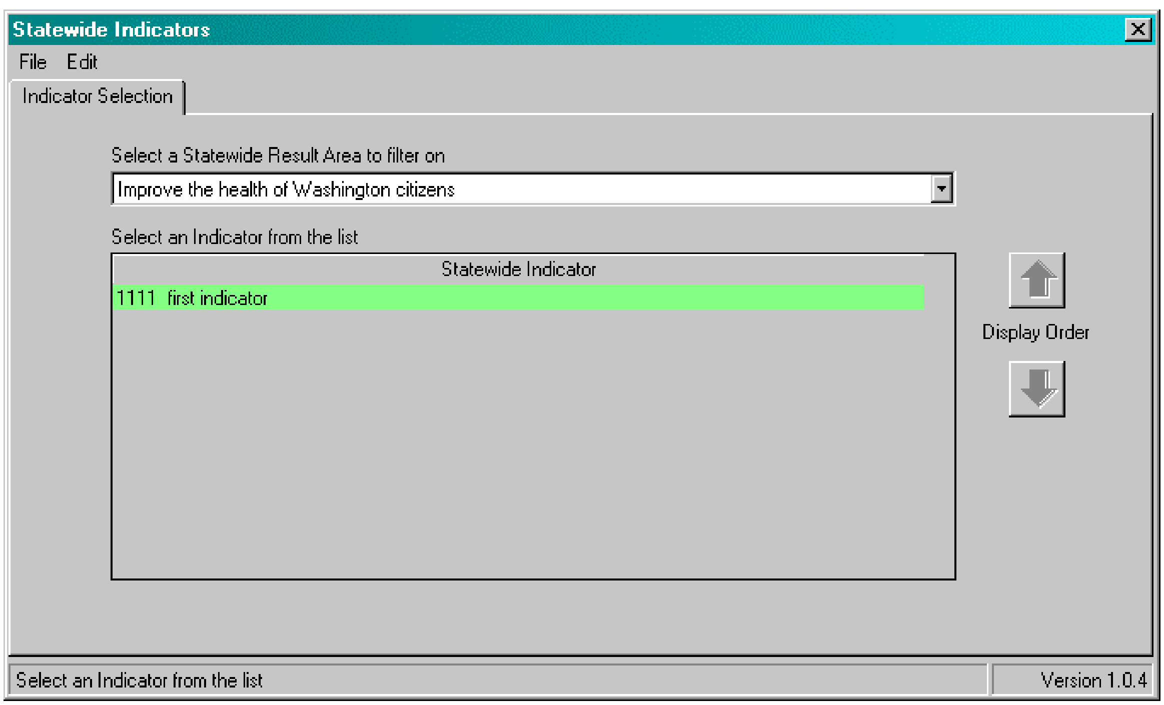
Access – From the WinSum Menu Bar select **File / Open / Statewide Indicators**, select the appropriate **Version,** and click **OK**. Once in another screen of the Statewide Indicators module, you can get back to the Indicator Selection by selecting **View / Statewide Indicator Selection** from the PMT menu bar.

1. Statewide Indicator Selection

Concept - The Statewide Selection screen lists all indicators for the selected the state by Statewide Result Area. There is the ability to filter the performance measures to view based on Statewide Result Areas. Users with appropriate security may add, edit, or delete indicators from this screen (see **PMT Security**).

Screen Notes –

- You may double click to open a specific indicator.
- You can "filter" the indicators viewed in the selection screen based on statewide result area.



Select a Statewide Result Area to filter on – This combo box provides a list of all statewide result areas available for the version selected when entering the system plus an option for <All Result Areas>. The default is to not select any Result Area, thereby not displaying any indicators. After the user has selected their option of a Statewide Result Area or All Statewide Result Areas, the list of related Indicators will be provided.

Statewide Indicator – All indicators relating to the Result Area selected above will be displayed here. Users can double click to open an indicator, or use the Edit options to Add, Delete (selected Indicator as indicated by the green row) or Edit an Indicator in the Statewide Indicator Detail. The Indicators are listed in Display Order. The Display Order is by Indicator code by default.

Display Order – The Up Arrow and Down Arrow are used to move the selected Indicator in the list to the desired order of display. This display order will be used on this screen as well as for determining the order to display indicators on reports. The user must save changes to this screen before the Display Order will be realized.

B. Statewide Indicator Detail

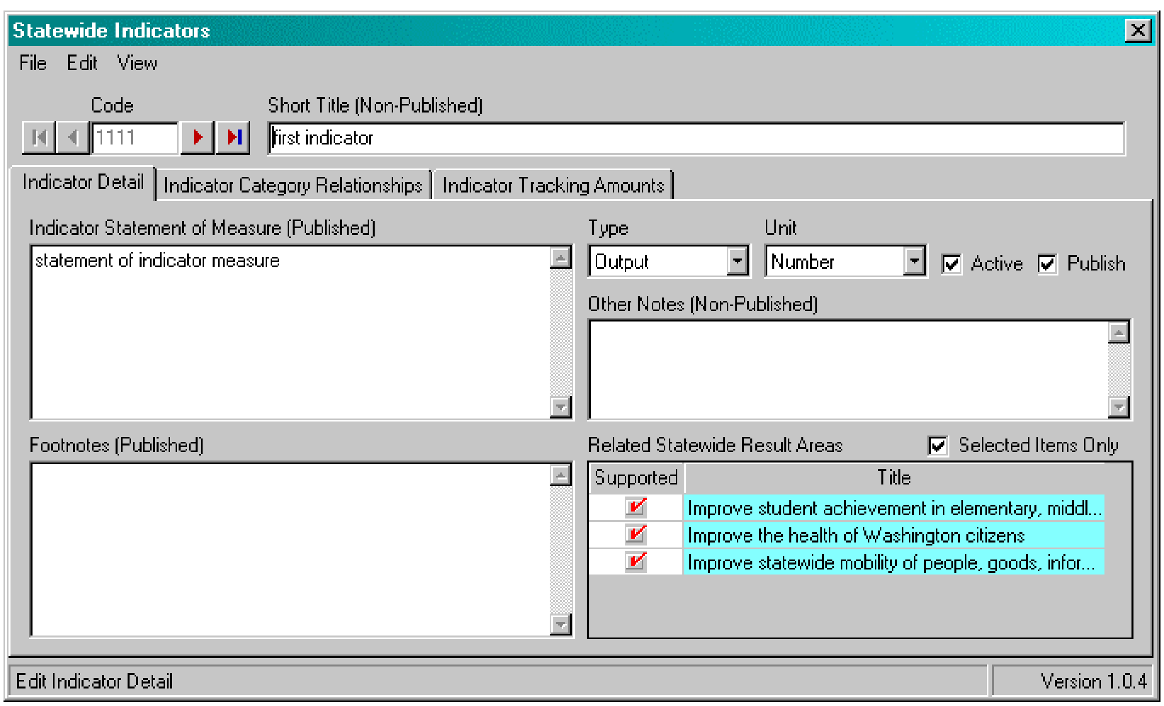
Concept – Statewide Indicators include basic descriptive information, relationship to Statewide Result Areas as well as Statewide Categories, and measure target and actual amounts. This set of screen provides access to these elements of the Statewide Indicator.

Access – From the WinSum Menu Bar select **File / Open / Statewide Indicators**, select the appropriate **Version,** and click **OK**. After selecting the Statewide Result Area or

1. Statewide Indicator Detail

Concept – The Statewide Indicator Detail tab contains the basic information about the indicator. It is used to view, edit, or add new Indicators.

Screen Notes – None



Code – Displays the indicator code of the indicator being reviewed. The code is not editable for existing indicators. The code will be blank if adding a new inditcator for the user to enter the desired code. Codes may only be used one per agency and are 4-characters long.

Navigation buttons (|<, <, >, >|) – These buttons maybe used to navigate through the indicators.

|< - First record
< - Previous record
> - Next record
>| - Last record

Short Title (Non-Published) – A short title for the Indicator. This title is used to display the measure in the **Statewide Indicator Selection** screen. It is not published in reports or on the Internet. This title may be 100 characters long.

Type – This combo box provides options for the type of measure of the indicator. Options include Output, Outcome, and Efficiency.

Unit – This combo box provides options for the unit of measure for the indicator. Units include number, dollar, percent, and ratio. The unit will drive how information is displayed on reports.

Active – Since indicators do not have status like Performance Measures this checkbox is used to indicate whether an indictor is Active or not. When this box is not checked the Indicator is assumed to no longer be active and will not be included on reports.

Publish – This checkbox is only visible to OFM users and editable by OFM Budget Operations users. All performance measures get marked as Publish by default. OFM Budget Operations may uncheck this box to indicate they do not want the measure to be included in reports published to the Internet.

Indicator Statement of Measure (Published) – This field is used to record the full statement of measure to be included on reports. The statement of measure may be up to 255 characters long.

Footnotes (Published) – This field is used to record any footnotes to include with the Indicator on reports. The footnotes speak to the measure in general. The footnote may be up to 500 characters long.

Other Notes (Non-Published) – This field is used to record any additional information about the performance that should not be included on reports. The field is visible to OFM and agency staff, but will not be available on any reports. Other notes may be up to 500 characters long.

Related Statewide Result Area – Contains as list of all Statewide Result areas for the version selected when entering the Statewide Indicator module.

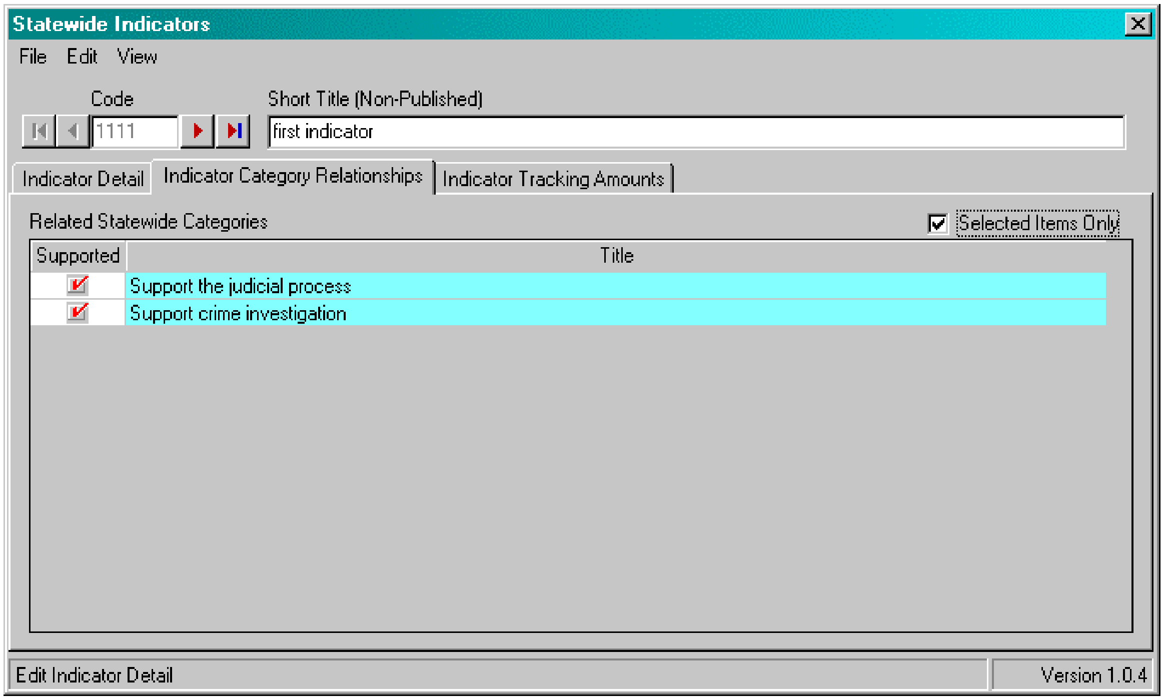
Selected Items Only – When this box is checked, only Result Areas that have been marked as supporting the Indicator will be displayed in the list.

Supported - When this box is checked the Indicator is assumed to support this Statewide Result area and will be included on reports by Result Area for each Result Area Selected.

2. Statewide Indicator Category Relationships

Concept – Statewide Indicators can relate to one or many Statewide Categories (aka Statewide Strategies). This screen provides the ability to record and save these relationships.

Screen Notes – None



Code – Displays the indicator code of the indicator being reviewed. The code is not editable for existing indicators. The code will be blank if adding a new inditcator for the user to enter the desired code. Codes may only be used one per agency and are 4-characters long.

> Navigation buttons (|<, <, >, >|) – These buttons maybe used to navigate through the indicators.
>
> > |< - First record
> > < - Previous record
> > > - Next record
> > >| - Last record

Short Title (Non-Published) – A short title for the Indicator. This title is used to display the measure in the **Statewide Indicator Selection** screen. It is not published in reports or on the Internet. This title may be 100 characters long.

Related Statewide Categories – Contains as list of all Statewide Categories for the version selected when entering the Statewide Indicator module.

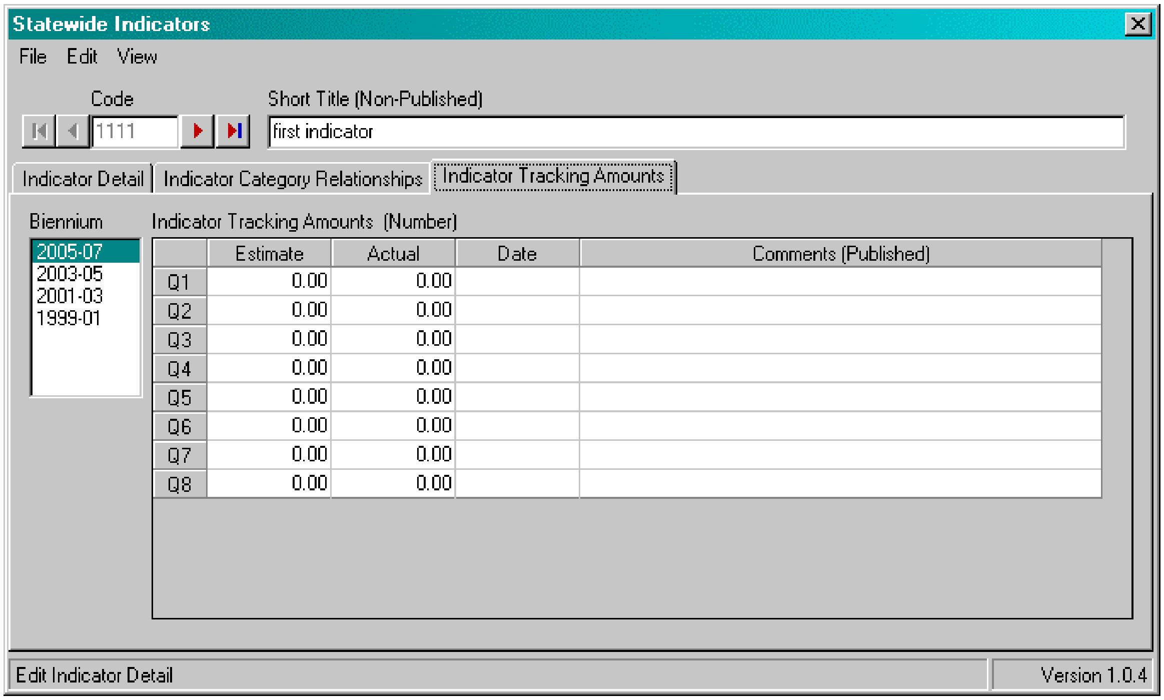
> Selected Items Only – When this box is checked, only Categories that have been marked as supporting the Indicator will be displayed in the list.
>
> Supported - When this box is checked the Indicator is assumed to support this Statewide Strategy and will be included on reports by Strategy.

3. Statewide Indictor Amounts

Concept – The Statewide Indicator Amounts screen is used to record all estimate and actual Indicator amounts. The screen provides the ability to enter historical information for more meaningful reporting.

Screen Notes

A new option called **Add Prior Biennium** is available under **Edit** for this screen only. The option will add the biennium prior to the last biennium listed. There is no limit on the number of biennia added. This option is used to capture historical information for inclusion in reports.



Code – Displays the indicator code of the indicator being reviewed. The code is not editable for existing indicators. The code will be blank if adding a new inditcator for the user to enter the desired code. Codes may only be used one per agency and are 4-characters long.

Navigation buttons (|<, <, >, >|) – These buttons maybe used to navigate through the indicators.

|< - First record
< - Previous record
> - Next record
>| - Last record

Short Title (Non-Published) – A short title for the Indicator. This title is used to display the measure in the **Statewide Indicator Selection** screen. It is not published in reports or on the Internet. This title may be 100 characters long.

Biennium – The list box displays all biennia available. The ensuing biennium will be added as part of the BASS Biennial Roll process that happens about December of odd numbered years. Agencies may add prior biennia by selecting **Edit / Add Prior Biennium** from the PMT menu bar. Data entered into prior biennia will be included in the data trend line on all reports.

* An asterisks next to a biennium indicates that there are unsaved changes to tracking in that biennium if the user is an agency user or unapproved changes if the user is an OFM analyst.

Tracking Amounts - Heading for the tracking worksheet in PMT. The unit of the measure is displayed in parenthesis next to the "Tracking Amounts" label.

Q1 – Q8 – Indicates the quarters in the biennium. Estimates or actuals should be recorded in the appropriate quarter for the measure. Quarters with no estimates, actual, date measured, or comments are hidden from reports.

Estimate – This is used to record the estimated level of the performance measure within the appropriate quarters.

Actual – This is used to record the actual level of the performance measure once the appropriate time period has passed.

Date – Reserved for date measured. This field is not required. It is recommended you complete the date measured when the actual date measured is not in alignment with the period entering for (e.g., date measured was 2-weeks after the end of the quarter). This date will be displayed on reports when associated with the last quarter with actual amounts.

Comments – Comments regarding the current quarter measure. This field is not required. It is recommended to record anomalies in data. The comment will be displayed on reports when associated with the last quarter with actual amounts.

V. Reporting

A. Performance Progress Reports

Concept – The Performance Progress Reports provide wide variety of views of performance measures and their relationship to Agencies, Activities, Statewide Result Areas and Categories. In addition, there are options for which information to include on the various reports.

Access – Performance Progress Reports are accessible through the Enterprise Reporting system. A separate Enterprise Reporting login is required to access the reports. The Login screen for ER can be found on-line at:

http://reporting.ofm.wa.gov/logonform.csp?action=logoff (Inside the State Firewall)

https://fortress.wa.gov/ofm/reporting/logonform.csp?action=logoff (From outside of the State Firewall)

More specific information regarding ER can be found in the system documentation provided in links from the ER Login Screen. This document will specifically discuss the options for running the report and the report layout.

1. PMT001 – Performance Progress by Agency, Activity

Concept – This report provides information on performance measures as it relates to each agency and their activities.

Assumptions

- Agency users will be able to run this report for any agency that they have “scheduler” access for.
- OFM users will be able to run this report for any agency.
- This report can only be run for one agency at a time.

<u>Layout</u> – This report provides information on Performance Measures as they relate to the agency and activities.

Agency – Agency Code and Title

Activity – Code and Title

Statewide Result Area – Title of the Primary Result Area selected for the activity

Statewide Strategy – Title of the Statewide Strategy selected for the activity. This selection is done by OFM (see **Statewide Indicator Category** Relationships) and is not visible within the system to Agency staff.

Expected Results – If expected results are associated with the activity it will be displayed here

Performance Measure

Data Table – Displays the Statement of Measure, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

<u>Parameters</u> – The following are parameters available for customizing the running of the report.

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Budget Period – Select the budget period with the associated version for activities to be included in the report.

Agency – Select the agency for the report. Users have the options of selecting for agencies that they are authorized “schedulers” for.

Program – Enter a program here to limit the report to measures that tie to a specific program. Leave blank to include all measures regardless of program or unassigned.

Version – Enter the corresponding version that contains the appropriate activity descriptions to include on the report. Agency users will use a BDS version code; OFM users will use a WinSum version code.

Status – Select a performance measure status to include on the reports. You can only report on one performance measure status at a time. If a measure exists with that status it will be included regardless of additional statuses of the measure that might also exists. In other words, if you limit to Approved measures and you have an Edit copy of the approved measure, you will see the Approved copy of the measure on the resulting report. See **PMT Statuses** for more information.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Expected Results – A Yes or No option to include the Expected Results narrative with the activity.

Include Trendline - A Yes or No option to include the Trendline with the performance measure.

Include Data Table - A Yes or No option to include the Data Table with the performance measure.

Version Source – This field displays the Version Source available to the user. This is not modifiable but does indicate A-Agency for BDS as the source of the version data or O-OFM for WinSum as the source of the version data.

2. PMT002 – Performance Progress by Result Area, Strategy (Category), Activity

Concept – This report provides information on Statewide Indicators and performance measures as they relate to Statewide Result Areas, Categories, and agency activities. Only activities where the Statewide Result Area is the primary selection will display on this report.

Assumptions

- This report can be run for a single Statewide Result Area.
- The report will include all agencies with data based on the parameter selections.
- Only performance measures with an approved status will be available for this report.
- This report may only be run against OFM Official Versions.

Layout

Result Area Title – Title of the Statewide Result Area per the selected version that the following information relates to.

Statewide Indicators – Statewide indicators that are associated with the Result Area but do not have a Strategy relationship will be displayed here.

Data Table – Displays the Statement of Measure for the indicator, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Strategy – Strategies (categories) that relate to the Statewide Result Area as indicated above.

Statewide Indicators – Indicators that are linked to Categories will be displayed here with the appropriate strategy.

Data Table – Displays the Statement of Measure for the indicator, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Activity Code & Title – Activity with Code and Title that match the version selected and Primary Statewide Result Area and Strategy above. Strategy relationships are not visible to agency users through the PMT or BDS systems, however categories indicated by OFM staff will be displayed in reporting.

Agency – Agency where the activity above resides.

Expected Results – If expected results are associated with the activity it will be displayed here

Performance Measure - Approved status only

Data Table – Displays the Statement of Measure, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

<u>Parameters</u> – The following are parameters available for customizing the running of the report.

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Budget Period – Select the budget period for the associated version for activities to be included in the report.

OFM Activity Version – Enter the corresponding OFM version that contains the appropriate activity descriptions to include on the report.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Expected Results Text – A Yes or No option to include the Expected Results narrative with the activity.

Include Trendline - A Yes or No option to include the Trendline with the indicators and performance measures.

Include Data Table - A Yes or No option to include the Data Table with the performance measures and indicators.

Statewide Result Area – Select the Statewide Result Area for the report. User can select a single Statewide Result Area. This parameter will look at only the Primary Statewide Result Area of activities.

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3. PMT003 – Performance Progress by Result Area and Strategy (statewide indicators only)

Concept – This report is intended to show the high level Statewide Indicators as they relate to Statewide Result Areas. Only activities where the Statewide Result Area is the primary selection will display on this report.

Assumptions

- This report can be run for a single Statewide Result Area.
- The report will include all agencies with data based on the parameter selections.
- Only performance measures with an approved status will be available for this report.
- This report may only be run against OFM Official Versions.

Layout

Result Area Title – Title of the Statewide Result Area per the selected version that the following information relates to.

Statewide Indicators – Statewide indicators that are associated with the Result Area but do not have a Strategy relationship will be displayed here.

Data Table – Displays the Statement of Measure for the indicator, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Strategy – Strategies (categories) that relate to the Statewide Result Area as indicated above.

Statewide Indicators – Indicators that are linked to strategies will be displayed here with the appropriate strategy.

Data Table – Displays the Statement of Measure for the indicator, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Parameters – The following are parameters available for customizing the running of the report.

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Budget Period – Select the budget period with the associated version for activities to be included in the report.

OFM Activity Version – Enter the corresponding OFM version that contains the appropriate activity descriptions to include on the report.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Trendline - A Yes or No option to include the Trendline with the indicators and performance measures.

Include Data Table - A Yes or No option to include the Data Table with the performance measures and indicators.

Statewide Result Area – Select the Statewide Result Area for the report. User can select a single Statewide Result Area.

4. PMT004 – Performance Progress by Agency

Concept - This report contains a quick view of all performance measures by agency. No version is required since it only lists measures as they relate to the agency. This report was provided as a quick view to an agencies performance measures.

Assumptions

- Agency users may run the report for any agency they have Enterprise Reporting "Schedule" access.
- OFM users may run this report for any agency.
- OFM users will never be able to view agency measures in Edit status.
- This report can only be run for one agency at a time.

Layout

Agency – Agency Code and Title

Performance Measure

Data Table – Displays the Statement of Measure, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Parameters

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Agency – Select the agency for the report. Users have the options of selecting for agencies that they are authorized "schedulers" for.

Program – Enter a program here to limit the report to measures that tie to a specific program. Leave blank to include all measures regardless of program or unassigned.

Status – Select a status to include on the reports. You can only report on one status at a time. If a measure exists with that status it will be included regardless of additional copies of the measure that might also exists. In other words, if you limit to Approved measures and you have an Edit copy of the approved measure, you will see the Approved copy of the measure on the resulting report. OFM users are will not be allowed to run this report for measures in **Edit** status. See **PMT Statuses** for more information.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Trendline - A Yes or No option to include the Trendline with the performance measure.

Include Data Table - A Yes or No option to include the Data Table with the performance measure.

5. PMT005 – Performance Progress by Result Area, Agency, Activity

Concept – This report provides information on Statewide Indicators and performance measures as they relate to statewide result areas (primary only), agencies, and agency activities. Only activities where the Statewide Result Area is the primary selection will display on this report.

Assumptions

- This report can be run for a single Statewide Result Area.
- The report will include all agencies with data based on the parameter selections.
- Only performance measures with an approved status will be available for this report.
- This report may only be run against OFM Official Versions.

Layout

Result Area Title – Title of the Statewide Result Area per the selected version that the following information relates to.

Statewide Indicators – Statewide indicators that are associated with the Result Area

Data Table – Displays the Statement of Measure for the indicator, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Agency – Agency code and title for the activity, expected results, and performance measures that follow

Activity Code & Title – Activity with Code and Title that match the version selected and Primary Statewide Result Area and Strategy above. Strategy relationships are not visible to agency users through the PMTE or BDS systems, however categories indicated by OFM staff will be displayed in reporting.

Statewide Strategy – The title of the Statewide Strategy associated with the activity will be displayed here.

Expected Results – If expected results are associated with the activity it will be displayed here.

Performance Measure – Approved status only

Data Table – Displays the Statement of Measure, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Parameters – The following are parameters available for customizing the running of the report.

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Budget Period – Select the budget period for the associated version for activities to be included in the report.

OFM Activity Version – Enter the corresponding OFM version that contains the appropriate activity descriptions to include on the report.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Expected Results Text – A Yes or No option to include the Expected Results narrative with the activity.

Include Trendline - A Yes or No option to include the Trendline narrative with the indicators and performance measures.

Include Data Table - A Yes or No option to include the Data Table narrative with the performance measures and indicators.

Statewide Result Area – Select the Statewide Result Area for the report. User can select a single Statewide Result Area. This parameter will only look to Primary Statewide Result Area for each activity.

6. PMT006 – Performance Progress by Strategy (Category), Agency, Activity

Concept – This report provides information on Statewide Indicators and performance measures as they relate to categories, agencies, and agency activities.

Assumptions

- This report can be run for a single Strategy (aka Category).
- The report will include all agencies with data based on the parameter selections.
- Only performance measures with an approved status will be available for this report.
- This report may only be run against OFM Official Versions.

Layout

Strategy – Title of the Statewide Strategy (aka Category) per the selected version that the following information relates to.

Statewide Indicators – Statewide indicators that are associated with the Strategy will be displayed here.

Data Table – Displays the Statement of Measure for the indicator, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Agency – Agency code and title for the activity, expected results, and performance measures that follow

Activity Code & Title – Activity with Code and Title that match the version selected and Statewide Result Area and Strategy above. An activity may be displayed under more than one Result Area or Strategy. Strategy relationships are not visible to agency users through the PMTE or BDS systems, however categories indicated by OFM staff will be displayed in reporting.

SW Result Area – Displays the primary statewide result are of the agency activity for information.

Expected Results – If expected results are associated with the activity it will be displayed here

Performance Measure

Data Table – Displays the Statement of Measure, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if the trend line is included in the report.

Parameters – The following are parameters available for customizing the running of the report.

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Budget Period – Select the budget period for the associated version for activities to be included in the report.

OFM Activity Version – Enter the corresponding OFM version that contains the appropriate activity descriptions to include on the report.

Program – Enter a program here to limit the report to measures that tie to a specific program. Leave blank to include all measures regardless of program or unassigned.

Status – Select a status to include on the reports. You can only report on one status at a time. If a measure exists with that status it will be included regardless of additional copies of the measure that might also exists. See **PMT Statuses** for more information.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Expected Results – A Yes or No option to include the Expected Results narrative with the activity.

Include Trendline - A Yes or No option to include the Trendline narrative with the indicators and performance measures.

Include Data Table - A Yes or No option to include the Data Table narrative with the performance measures and indicators.

Strategy – Select the Statewide Strategy for the report. The user may select a single Statewide Strategy to report on.

7. PMT007 – Performance Progress by Agency, Result Area, Activity

Concept – This report provides information on performance measures has it relates to each agency and their activities.

Assumptions

- Agency users will be able to run this report for any agency that they have “scheduler” access for.
- OFM users will be able to run this report for any agency.
- This report can only be run for one agency at a time.

Layout – This report provides information on Performance Measures as they relate to the agency and activities.

Agency – Agency Code and Title

Statewide Result Area – Title of the Primary Result Area selected for the activity

Activity – Code and Title

Statewide Strategy – Title of the Statewide Strategy selected for the activity. This selection is done by OFM (see **Statewide Indicator Category** Relationships) and is not visible within the system to Agency staff.

Expected Results – If expected results are associated with the activity it will be displayed here

Performance Measure

Data Table – Displays the Statement of Measure, estimates and tracking amounts, performance measure footnote, and last quarter tracked date measured and comments (if available) for three biennia of data going back from the most current biennium.

Trend line – Plots a trend line of estimates and actuals for all biennia with data. The statement of measure will be displayed above the trend line if only the trend line is included in the report.

<u>Parameters</u> – The following are parameters available for customizing the running of the report.

Personal Title – Users may add a personal title to the report. Use of this parameter is optional.

Budget Period – Select the budget period with the associated version for activities to be included in the report.

Agency – Select the agency for the report. Users have the options of selecting for agencies that they are authorized "schedulers" for.

Program – Enter a program here to limit the report to measures that tie to a specific program. Leave blank to include all measures regardless of program or unassigned.

Version – Enter the corresponding version that contains the appropriate activity descriptions to include on the report. Agency users will use a BDS version code; OFM users will use a WinSum version code.

Status – Select a status to include on the reports. You can only report on one status at a time. If a measure exists with that status it will be included regardless of additional copies of the measure that might also exists. In other words, if you limit to Approved measures and you have an Edit copy of the approved measure, you will see the Approved copy of the measure on the resulting report. See **PMT Statuses** for more information.

Starting Biennium – The report includes three biennia worth of data. Starting biennium indicates the most current biennium to include. Two additional biennia will also be included on the report when available.

Include Expected Results Text – A Yes or No option to include the Expected Results narrative with the activity.

Include Trendline - A Yes or No option to include the Trendline with the performance measure.

Include Data Table - A Yes or No option to include the Data Table with the performance measure.

Version Source – This field displays the Version Source available to the user. This is not modifiable but does indicate A-Agency for BDS as the source of the version data or O-OFM for WinSum as the source of the version data.

B. Data Export

Concept - The **Data Export** function allows users to export their performance measure data to a text file that can be opened in Excel or imported into another system. The exported files contains all information available regarding a performance measures and includes all copies of a performance measure regardless of status as well as any statewide indicators that are available. Please see **PMT Statuses** for more discussion on statuses.

Access – The **Data Export** function is available via **Tools / Data Export** from the PMT Menu bar when in either the **Performance Measure Selection** or **Performance Measure Detail** functions of PMT.

1. Data Export

Concept - The **Data Export** function allows users to export their performance measure data to a text file that can be opened in Excel or imported into another system. The exported files contains all information available regarding a performance measures and includes all copies of a performance measure regardless of status as well as any statewide indicators that are available. Please see **PMT Statuses** for more discussion on statuses.

Assumptions

- All performance measures will be exported regardless of status (except OFM user will not export Edit or Unapproved measures) or user filter settings.
- Agency users will be able to export performance measures for their agency.
- Related Statewide Indicators will be included in all exports.
- When the export is selected with a version identified in PMT, the export will contain related activities, statewide result area, and strategy relationships provided.
- When the export is selected without a version identified in PMT, any fields that are version specific (activities, statewide result area, strategy) will be blank.
- OFM Users will be presented with an option to run the export for only the agency they are working with or for all agencies.
- The exported file will be saved as a pipe-delimited text file. Pipe refers to the | character (shift-/ key).
- The standard Windows Save File As dialog box will be used to save the exported file.
- The user “file type” option will be limited to .txt in the Save File As dialog box.
- If no data is returned from the export, a message will be given to the user and no file will be saved.

Layout

Field Exported	Displays for Indicator/ PM / Both	Example	Other Notes
Version	Both	20	Only displayed when version identified in PMT.
Version Title	Both	Version Title	Only displayed when version identified in PMT.
Agency	PM	090	
Agency Title (text)	PM	Office of Stuff	
Status	PM	Approved	Display all status based user security
PM_Code/ Indicator_Code	Both	0ABC	
PM/ Indicator Title	Both	PM Title	
Statement of Measure	Both	Statement of Measure	
Activity	PM	A001	Only displayed when version identified in PMT.
Activity Title	PM	Central Financial Systems Development and Maintenance	Only displayed when version identified in PMT.
Activity Description	PM	The Office of Financial Management's (OFM) Central Financial Systems Development and Maintenance,,,	Only displayed when version identified in PMT.
Category (aka SW Strategy)	Both	06	Only displayed when version identified in PMT.
Category Title	Both	Promote Washington Products	Only displayed when version identified in PMT.
Result Area	Both	AA	Only displayed when version identified in PMT.
Result Area Title	Both	Improve student achievement in elementary, middle and high schools	Only displayed when version identified in PMT.
Type Title	Both	Outcome	
Unit Title	Both	Percent	
Footnote	Both	My footnote	
Biennium	Both	2005-07	Indicates the biennium of the following column amounts
*Qtr	Both	1^{st} Qtr	Will only display if **tracking** or **budget** amounts exist.
Estimate	Both	1,000	Will only display if **tracking** amounts exist.
Actual	Both	1,000	Will only display if **tracking** amounts exist.
Budget Amount	PM	1,000	Will only display if **budget** amounts exist, otherwise will display empty string.
Date Measured	Both	02/15/2005	Will only display if **tracking** amounts exist.
Comment	Both	My comment	Will only display if **tracking** amounts exist.
Program	PM	010	Will only display if a specific program is identified.
Program Title (text)	PM	Administration	Will only display if a specific program is identified.
Other Notes	Both	Other notes	

Field Exported	Displays for Indicator/ PM / Both	Example	Other Notes
Indicator/ Performance Measure	Both	‘Indictor’ or ‘Performance Measure’	Identifies if the record is from the Agency Performance Measures or is a Statewide Indicator.

VI. Data Release

Performance Measures are released via the Data Release function of BASS. Users are required to have specific security allowing data release to access the required screen and release performance measures.

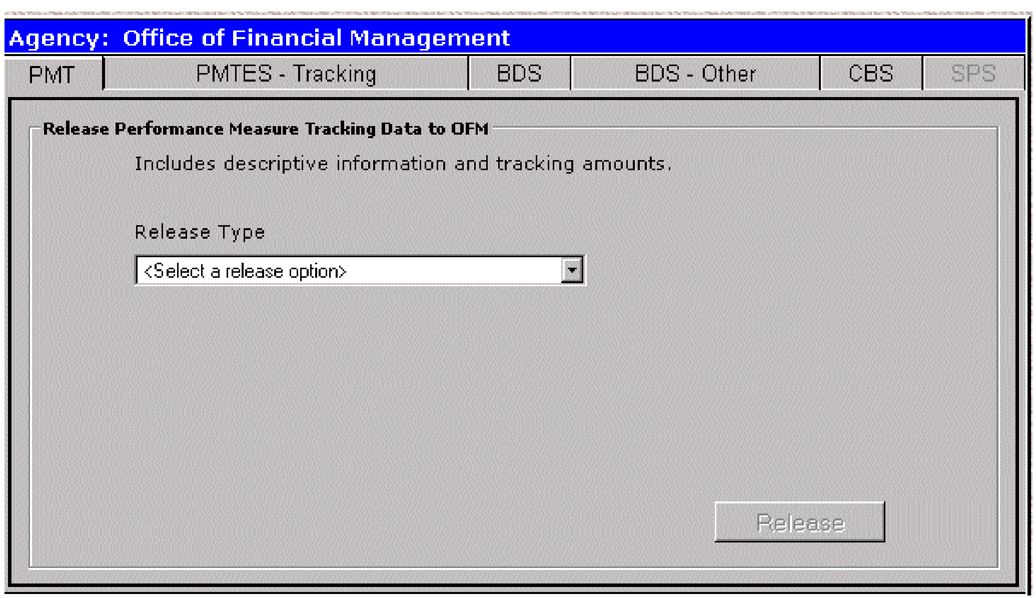
A. Data Release to OFM

Data Release to OFM is a separate BASS system for releasing BASS related data to OFM for review and/or approval as necessary.

Access – Users must request specific access to release data for the systems they have edit access for. In other words, having access to a system does not guarantee access to release data. The Data Release to OFM system is available on the BASS main menu under **Data Release to OFM** when a user has access to release data for any BASS system.

1. PMT

Concept – The PMT tab of the Data Release to OFM is where you can release data specific to the PMT system. Releasing data for PMT will “release” all measures in Edit status to a status of Pending where OFM can review and approve or unapproved the measure. Once released to OFM, the appropriate assigned OFM budget analyst will review the measures.



Release Type – User selects one of two release options.

Release all PMT Descriptive and Tracking Data – This option will release all performance measure data, descriptions and amounts, in edit status. This will be the standard option when releasing tracking estimates or tracking actuals. Users must be careful to ensure that all measures in Edit status are ready for release to OFM. This function will release all edit measures, no exceptions.

Release PMs not previously submitted (budget only) – This option will release only performance measures that have not previously been viewed and approved by OFM. Measures that have previously been released not be submitted and will remain in Edit status. The purpose of this release option is to allow new proposed measures to be submitted to OFM during budget development without impacting current tracking progress.

Release – This button will become active once a release option has been selected. Clicking this button will release the data to OFM. No pre-release edits are run on PMT data being released so release is automatic. The agency user who released, their OFM analyst, and OFM Budget Operations staff will receive an e-mail notification once data is released.

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